How Microsoft builds brands for the whole person

A guide to using psychology to optimize assets, boost ROI, and generate measurable business impact.

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The myopia of only paying attention to attention

One thing most marketers can agree on in today's media landscape is that it's an enormous challenge to break through and connect with people. We are told daily that our brand-building campaigns compete in the "attention economy" and that if we don't grab people in the first few seconds, we will fail.

I hear this a lot as a researcher at Microsoft who spent the last two years audience-testing the videos that rebranded the $11 billion Office business into Microsoft 365. But I also understand human attention more broadly as a Ph.D. psychologist who has written on behavioral design and taught it since 2010 to communications master's students at the University of Washington.

And what I have learned is this: If you focus only on grabbing attention, your brand-building will still fail.

Humans are more than eyeballs and fingertips. The brand-building campaigns that succeed are optimized for the remaining bottlenecks in human neurology, which are just as selective as attention. Our branding assets do not, contrary to popular opinion, compete in an "attention-economy." They compete in the "attention-, perception-, memory-, emotion-, identity-, social-economy."

This paper relates how we operationalized that perspective into our audience-testing for Microsoft 365 Brand Studio, which brought the creative in-house to establish an ecosystem of content from product videos and ads to award-winning web series and doc-style films. Microsoft's ambition is to elicit emotional responses with these assets, improve inclusivity, create memories, and be shared broadly—so we needed to take an equally broad approach to measurement.

I hope our experience will help you make the business case that we did: to define success beyond reach and percent viewed; to retool your audience-testing to answer the question: "Once we get their attention, then what?" Fortunately, advances in survey technology let us digitally transform our optimization research, and in the process, see the customer as a whole person and take a much broader view of what an optimized brand video really is.

Built to filter: the "bottlenecks" metaphor

I find it useful to look at human neurology like a computer scientist looks at bottlenecks in throughput, or a COO looks at bottlenecks in a business process. Bottlenecks happen whenever the potential volume (of, in this case, all the ads, emails, campaigns, or videos produced by marketers) is limited by the maximum capacity downstream. If you've ever commuted to work, you know. Any time you are stuck in traffic, a bottleneck has almost always formed ahead.

As you look across human psychology, you'll find so many of these constrictions that it is hard not to think we evolved that way. There are constrictions in our retina and in the tiny capacity of our short-term memories. They continue through our instantaneous perceptions and make-or-break moments in habit formation. We filter our world through our identity and finally in what we recommend to others socially. Considering all of that, it seems clear that people were built to filter.

Each of these bottlenecks has a long history of academic study, but here's how my research respondents experience them:

- Attention: "I never saw it, or if I did, I just didn't orient to it. So I just moved on."

- Perception: "I didn't realize the message was for your brand or your product."

- Memory: "I might've glanced at it, but I didn't store it in my head for later."

- Emotion/Motivation: "I checked it out even hit *play*, but I didn't care enough to finish."

- Identity: "I dropped off because it didn't seem like it was for people like me."

- Social: "I saw the message and experienced the product, but I wouldn't recommend either."

These perspectives derive from what I called *receptivity theory* in my 2017 book *Bottlenecks: Aligning UX Design with User Psychology*. The book shows that successful campaigns and products are those whose design maximizes customers' receptivity across the neurological spectrum—that is, their whole person.

Bottlenecks, like small attention spans, are not psychological shortcomings. They are the ways our customers ensure that they spend their time and neural resources on what matters, and that their life goals and our business goals are aligned. People use their bottlenecks to further their story, blocking noise to achieve meaning.
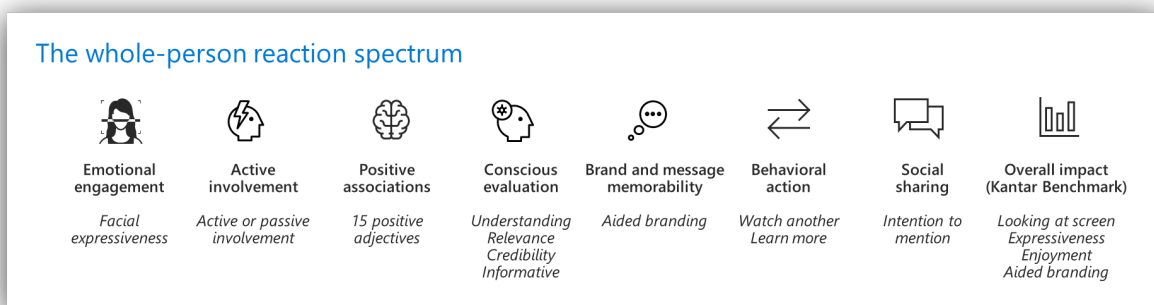
If nothing else, this perspective suggests we should broaden our optimization and tracking beyond attention. But more importantly, broadening our goals to survive all of the bottlenecks may also be more effective that making ever more aggressive attempts to survive any one. Time and again I have seen that the more aggressively we seek to survive *initial* bottlenecks, the more likely we will be blocked by *subsequent* ones. For example:

- Aggressive *attention*-grabbing treatments like auto-playing videos, interstitial interruptions, or gaudy colors…are often not *perceived* to be from a world-class brand like Microsoft, forfeiting the brand equity that can bolster the message.

- Campaigns that deceptively promise strong content, like thought-leadership videos that instead aggressively seek to *motivate* calls to action…are quickly jettisoned from *memory*. We may remember being click-baited, but we seldom remember the bait.

- Products like certain video games that aggressively *motivate* engagement by using addictive variable-reward schedules…often end up abandoned for *identity* reasons when customers return to seeking achievement in school or at work, sometimes trolling the brand *socially*.

- Overly fearful messaging around, for example, cybersecurity or data-governance intended to *motivate* sales…may run afoul of the *identity* that Security Pros wish to project at work, and such ads may be detracted from *socially***.**

All in all, optimizing for the whole person is another way to do well (in business) by doing good (making ethical design decisions). Unless you measure the whole-person spectrum in your optimization studies, you aren't giving yourself the best chance you could to succeed.

Operationalizing the whole person perspective in research

To transform our video-optimization research so it could assess the whole-person response, I partnered with Brandon Larson, Director, Microsoft 365 Brand & Communications Strategy, as well as a team from Kantar led by Amanda Currell and Stephen Dempsy. This chart outlines the eight metrics in the whole-person spectrum that we now gather for every video we test.

The whole-person reaction spectrum

Emotional engagement	Active involvement	Positive associations	Conscious evaluation	Brand and message memorability	Behavioral action	Social sharing	Overall impact (Kantar Benchmark)
Facial expressiveness	Active or passive involvement	15 positive adjectives	Understanding Relevance Credibility Informative	Aided branding	Watch another Learn more	Intention to mention	Looking at screen Expressiveness Enjoyment Aided branding

This transformation also needed to scale. According to Brandon, "Our in-house creative studio created over 100 videos in 2019 ranging from new features in Excel to the rebranding of Office into Microsoft 365." The studio produces videos for everything from massive keynotes to product websites. But this was not all of it—an internal training and support video production team led by Mary Miller "produced more than 200 how-to videos in 2019 viewed by millions of Microsoft customers on support.office.com and in our applications."

Fortunately, Kantar has already made inroads to measuring facial expressiveness and reaction-time measures of non-conscious associations by integrating them into online surveys. This meant we could broaden our measurement spectrum with no reduction in sample sizes. The approach to facial coding measured viewers' 'expressiveness' (i.e., any positive or negative emotional reaction to the video). This is a more reliable metric of engagement than merely looking at the screen, and it added layers to the emotional response.

Tapping non-conscious rapid associations, we had respondents perform an intuitive-associations test, where we measured average rate of 'fast yes' responses for various adjectives to describe the video (like *innovation, modern, authentic, playful*, or *premium*). Tests like this reveal knee-jerk perceptions even more effectively when real words are mixed with nonsense words like *sherile*, *plail*, *cerled* to increase cognitive load.

We put these elements together with traditional rating-scale measures of conscious persuasion and brand memorability tests that respondents took after viewing streamed videos. But how could we raise the bar on measuring behavioral action and social sharing? In the past, we would have asked people about their *intention* to watch or share the video, but these might represent more of a sentiment than real behaviors. However, if you think of taking an online survey like any other session on a streaming site or in social media, you *can* measure real behavior. Once the video was complete, we asked respondents whether they wished to view a second similar one, but this was totally optional. Their answer revealed something about the original video they watched: we found that stronger videos motivated additional viewing more so that weaker videos.

In the social sharing area, we are still experimenting. We ultimately asked whether respondents *would* tweet about the video they just watched or share it on LinkedIn, but we are exploring how to make this choice more realistic without introducing excessive deception. As with the behavioral measure of repeat viewing, clicking a link resembling the ubiquitous social sharing icons would reveal a strong indicator that the video had survived the social bottleneck, whether or not the action was completed. To gain more clarity on this issue, we invite fellow researchers to co-create this with us.

The real value of this study design is not in the metrics. In fact, all of the above have been available from a number of research agencies for some time. The value comes in the interpretive synergies that arise when you measure the full spectrum of responses on a given branding asset as you'll see next in our results.
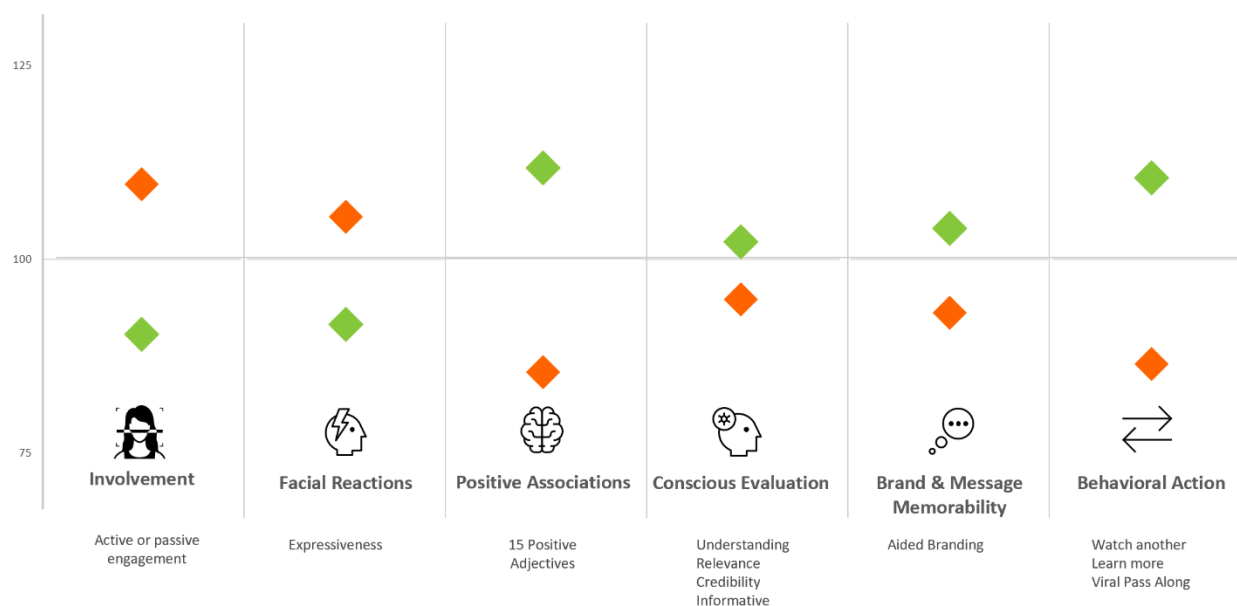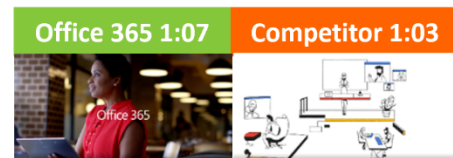
Insights from some of our research

Compete analysis: We began by comparing two already-published videos about Office 365 and a competitor. Microsoft Director of Branded Content & Creative David Beauparlant calls these "anthem" videos, which aim to "modernize our brand and connect with a new generation of customers who may be more familiar with our competitor."

We charted standardized metrics across the whole-person spectrum, indexing the videos against each other (or against the average in sets of three or more). The right side of the chart revealed that the

Office 365 video evoked more positive conscious associations and better triggered a behavioral desire to watch more. However, here the facial-expressiveness data on the left side of the chart suggested we would need another edit to connect emotionally so that our compelling content could do its persuasive work.

Compete analysis

Videos left positive associations and persuaded action but might face breakthrough challenges.

Involvement	Facial Reactions	Positive Associations	Conscious Evaluation	Brand & Message Memorability	Behavioral Action
Active or passive engagement	Expressiveness	15 Positive Adjectives	Understanding Relevance Credibility Informative	Aided Branding	Watch another Learn more Viral Pass Along

Social-attract potential: Our next test focused on a video that introduced the background blur feature in Microsoft Teams meetings. This was an unusual video for Microsoft. It expanded on a well-known humorous scenario in which a professor's children interrupted a televised interview. That video went viral, became a meme, and was the subject of talk show monologues. In our version, the professor suavely blurred the background and saved himself some embarrassment. Brandon Larson wondered whether the whole-person approach could "approximate the ability of our story to be 'thumbstopping' in a social media feed."

The results affirmed that the video had far greater social-attract potential than feature-focused videos, as seen by the high indexing in emotional engagement and social sharing. In general, I have found that people don't share videos for the strength of their information content; rather, they share videos that are humorous or surprising—that update their view of the world.

The Teams Background Blur video did just that. We used these findings to make our case for social amplification, and the campaign won an award in the "made for social media" category of the New York

Social attract potential

Taking risks to make emotional connections and leave a brand memory are supported by data, even when the subject is a feature.
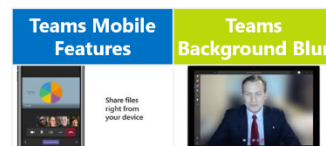
Cultural variations. Our last test pushed the boundaries of what the whole-person assessment could do. We were working to optimize the Modern Workplace Webcast Series, which featured a mix of interviews and demonstrations. Brandon Larson wanted to learn the right balance between these very different formats, as well as compare responses from viewers in the US and UK.
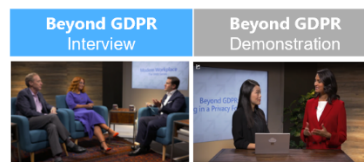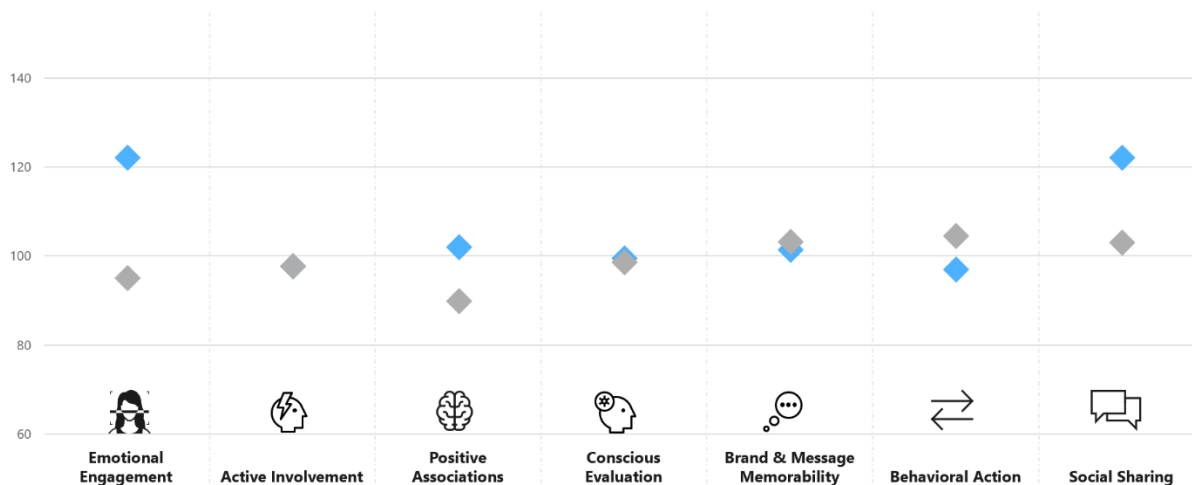
The whole-person results revealed an interaction between the format and the region. In the US, the interview format scored higher in non-conscious emotional engagement (on the left of the spectrum) and on social sharing propensity (on the right). In the UK, however, the demonstration format tested better on these same emotional and social dimensions. One of the ways we could accommodate this is in our editing: we could lead with different formats in different regions.

Thought leadership videos (US)
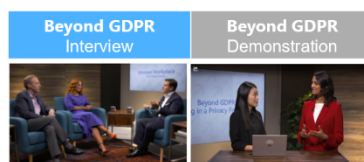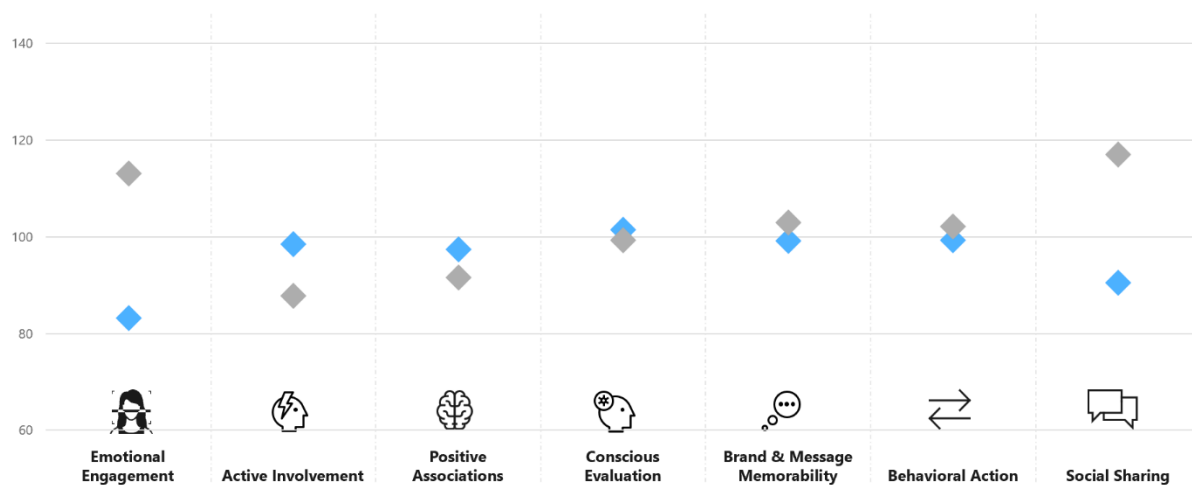Interview or demo? Cross cultural differences?

Beyond GDPR Interview | Beyond GDPR Demonstration

🇺🇸 **Whole Person Analysis**

Emotional Engagement | Active Involvement | Positive Associations | Conscious Evaluation | Brand & Message Memorability | Behavioral Action | Social Sharing

Thought leadership videos (UK)
Interview or demo? Cross cultural differences?

Beyond GDPR Interview | Beyond GDPR Demonstration

🇬🇧 **Whole Person Analysis**

Emotional Engagement | Active Involvement | Positive Associations | Conscious Evaluation | Brand & Message Memorability | Behavioral Action | Social Sharing

The bow-tie effect: As you look across the charts we've included, you might observe a pattern that we are also seeing. In every study, the video variations showed the *least* variability on the conscious evaluation dimension. These are the traditional rating-scale metrics that reveal how *understandable*, *relevant*, *credible*, and *informative* the videos were. By contrast, there is far more variability on non-conscious emotional metrics to the left in the spectrum, and on behavioral and social metrics to the right. The charts look like a bow tie, but this is not a statistical artifact because all the metrics index the normalized variance.

One implication is clear: We would not have seen the variability on the nonconscious and behavioral dimensions if we had not broadened our assessment of customers' reactions to our branding videos beyond the traditional conscious metrics. We might even have made the mistake of concluding that all the video variations were effectively tied—when they so clearly were not.

Impacts on the business

Optimization research on branding videos works best when it triggers another round of editing. Production teams that get more time with their assets before they go to market almost always make them better. One job of research is to point out which videos are worth the extra time, and what elements or moments they should amplify or remove.

We have looked at the in-market analytics for videos we optimized, and the benefits to our viewers and customers are clear.

In one analysis, seven of the feature-spotlight videos were ranked by their whole-person optimization. We then compared this to their viewability statistics in-market, specifically the percent who watched at least 25% or 75% of the videos. The range was considerable: only half (52%) of viewers watched 75% of the worst video in the set, compared to 80% for the best video. The behavioral proxies in the whole-person spectrum significantly predicted both 25% viewership (r=.77) as well as 75% viewership (r=.64). This confirmed our conclusion that if a video in a survey compels people to want to watch another in a survey, it will perform well in market.

Mary concluded, "The insights gained from this whole-person reaction study surfaced the most impactful video elements. While our videos already included several of these elements, we learned they could be even more impactful if we included others, like people, humor, and sound effects. The video team has applied these learnings and added these elements where possible in the videos produced in 2020."

Brandon Larson points out further ROI: "On a single video last year, we were able to make optimizations based on whole-person analysis that led to 75% gain in brand recall, a 50% gain in message recall, and a 56% gain in purchase intent. As this kind of impact is realized across our portfolio of 100+ videos, the potential impact on our overall marketing effectiveness is tremendous."

David Beauparlant adds, "We concept some crazy ideas that, to be honest, five years ago I could never have pitched. But with the research and learnings in place, we've been able to live our growth mindset and elevate our work. Since its adoption, I've seen our studio's creative grow in business and cultural impact due to this innovative research method."

Producing brand videos is an art, and producers are artists. They haven't always been receptive to research findings. Perhaps this was because we researchers were once too myopically focused on attention and conscious evaluations. The best outcome of broadening our work to assess the whole-person reaction might be connecting better with the producers who can act on it. Executive Creative Director Sue Boivin says the whole-person perspective, "has been integral to helping creatives create."

Future directions

Our explorations going forward are focused on the sensible question: which metrics should we win on in what channels and touchpoints? But our answer may surprise you. For the Microsoft 365 Studios, we're focused on optimizing for the whole-person in every campaign and every placement.

That perspective arose when we flipped the question on its head and asked ourselves, "Which metric in the whole-person spectrum is it safe to ignore? Or fail on?" Whether we were developing a branding video for a keynote address, or for television or a digital campaign, we felt that conceding any psychological bottleneck was an oversight or a curtailed ambition.

We should always connect emotionally even with captive audiences at conferences (who are now joining remotely due to COVID-19 and may easily wander) as well as with those who search for and purposefully visit our owned media. We need to persuade a change in customers' conscious perceptions even with the shortest sizzle rolls on social media. And even the most in-depth documentary-length pieces meant to educate or drive thought-leadership should enable the behavioral action that might generate a lead or a chance to deliver customer service.

Moreover, the creatives we test are sure to receive knockdown edits later for different placements and channels. This has become common under the "matching luggage" perspective, where even the shortest versions of videos should show strong integration with full-length versions. Thus, we believe development should proceed until an initial video is whole-person optimized.

As Amanda Currell of Kantar put it, "You may not always excel on everything, but you should avoid failing on any one thing. The whole-person framework helps us start by recognizing the very human mindsets and goals of our consumers. This humanization should continue through every stage of campaign development and optimization from creative brief to the media buy."

We invite you to contribute to our thinking. We at Microsoft agree with Amanda Currell that, "Further pushing the whole-person framework to set channel-specific expectations will help ensure a well-rounded campaign."
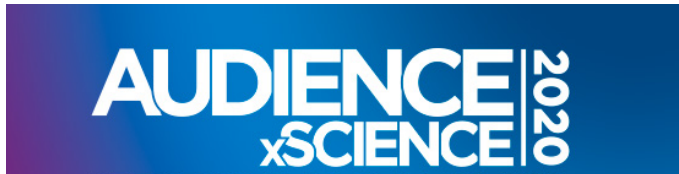
How can you get on board?

If the whole-person perspective and the business results we describe are attractive to you, you're probably wondering about your first steps. Here are some pointers:

- **First, redirect optimization research from a singular focus to a broader assessment of the whole-person response.** In addition to relying on the author's work, Microsoft's Customer and Market Research team worked with Kantar, which is among the firms that have considerable experience in this area.

- **Second, add more KPIs to your dashboards than Reach (MAU) and Frequency (DOU).** The best way to achieve this is to develop a lifetime revenue (LTV) database to understand customers' long-term usage and revenue across your entire portfolio.

- **Third, it's essential to understand that whole person optimization is about more than just revising your metrics.** It's about becoming customer obsessed to deeply understand their short- and long-term goals as well as their mindset in the moment. At Microsoft, empowering our customer to achieve more starts with understanding the story they want to tell about themselves.

Brand-building at Microsoft means connecting deeply with our customers. That customer-obsession begins with recognizing the authentically human mindsets and goals of our consumers—integrated across their whole-person. We're only at the beginning of our work in this area and the success that we had in the initial projects is a first step to socializing this approach across Microsoft. We wish you success in socializing it across your company.